Financial Services

Guidelines for Military OneSource financial services

All financial services are conducted by one of the following:

- Accredited financial counselors
- Certified credit counselors
- Chartered financial consultants

Military OneSource financial counselors provide information and education, not advice.

Financial counseling

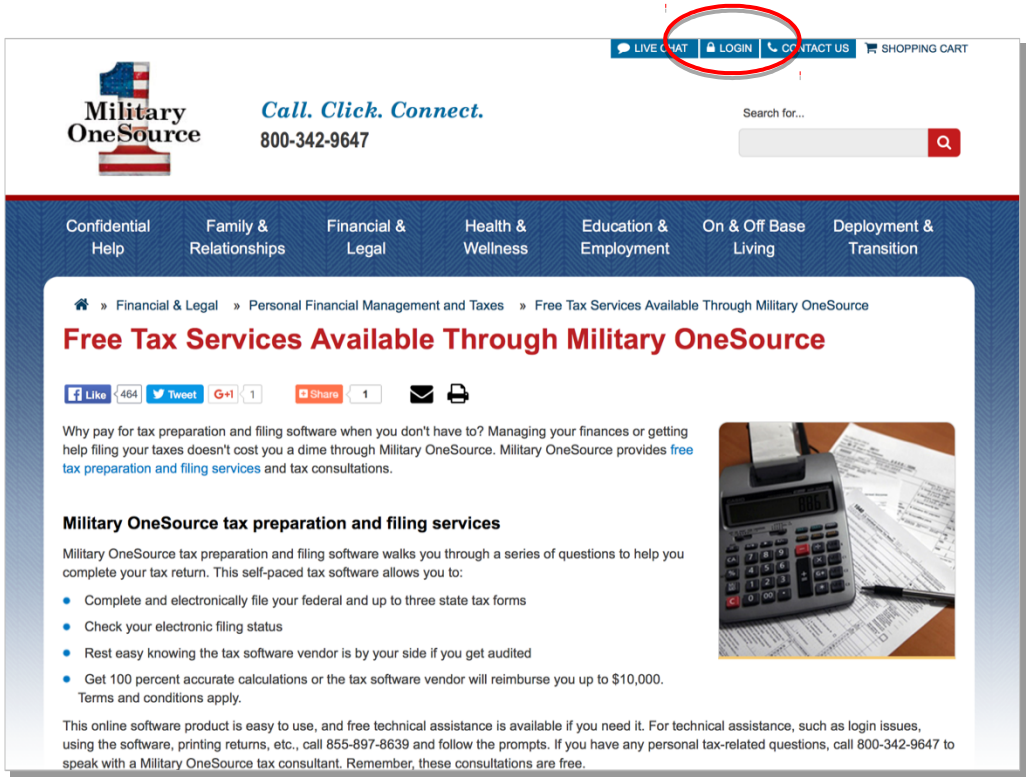
- Budgeting and general financial management
- Debt management
  - Establishing and restoring credit
  - Consolidating loans
  - Restructuring debt
- Housing
  - Buying, mortgages and home equity loans
  - Preventing eviction and foreclosure
- Military-specific financial matters
- Identity theft

Financial planning

- Investment options
  - Stocks, bonds, money markets, mutual funds and CDs
  - Risk
  - Electronic trading
- Retirement
- Savings plans
  - Traditional, Thrift Savings Plan, 401(k), 457(b), 403(b)
  - Roth IRA and pensions
- New parents and children's education
- Locating local certified financial planners

Tax filing

- Access free tax filing software
- Electronic filing of federal and up to three state returns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Why pay for tax preparation and filing software when you don't have to? Managing your finances or getting help filing your taxes doesn't cost you a dime through Military OneSource. Military OneSource provides free tax preparation and filing services and tax consultations.
Military OneSource tax preparation and filing services
Military OneSource tax preparation and filing software walks you through a series of questions to help you complete your tax return. This self-paced tax software allows you to:
Complete and electronically file your federal and up to three state tax forms
Check your electronic filing status
Rest easy knowing the tax software vendor is by your side if you get audited
Get 100 percent accurate calculations or the tax software vendor will reimburse you up to $10,000. Terms and conditions apply.
This online software product is easy to use, and free technical assistance is available if you need it. For technical assistance, such as login issues, using the software, printing returns, etc., call 855-897-8639 and follow the prompts. If you have any personal tax-related questions, call 800-342-9647 to speak with a Military OneSource tax consultant. Remember, these consultations are free.

Tax consultation

- Federal tax filing requirements
- Allowable deductions
- Tax exemptions and tax credits
- Individual Retirement Account deductions
- Form W-2 and Form W-4
- Divorce taxation
- Capital gains
- Self-employment
- Filing extensions and deployment

Financial tools

- Financial calculators
  - Home finance
  - Personal finance (car buying, college savings)
  - Retirement
  - Investment (savings and earnings)
- Financial audio and video tips
- Money management podcasts

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Financial & Legal » Personal Financial Management and Taxes » Are You Financially Fit? Here's How to Make it Happen
Are You Financially Fit? Here's How to Make it Happen
They say money can't buy happiness, but a financially healthy future can buy peace of mind — and that's a pretty valuable thing. Plus, financial security at home allows service members to be more focused and mission-ready. However, achieving financial fitness is much easier said than done. Luckily, the military cares about your financial future, too. Whether you want to learn about investing or create a personalized spending plan, help is right at your fingertips. In fact, it's never been easier to create a financial plan and stick to it.
To prove it, check out all the no-cost personal financial management programs available for service members and their families. You can start small, think big and then just sit back and watch your wealth grow.
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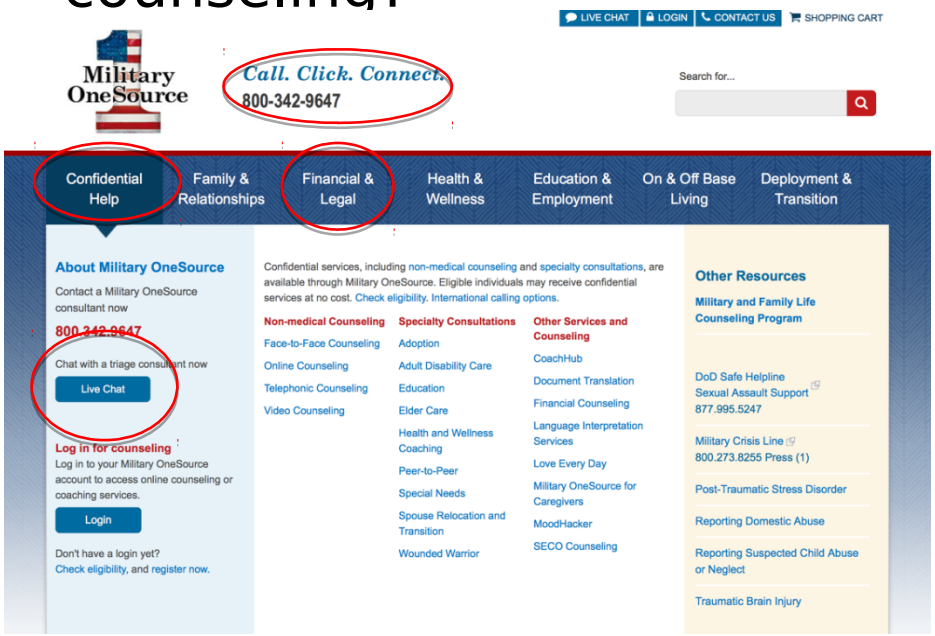
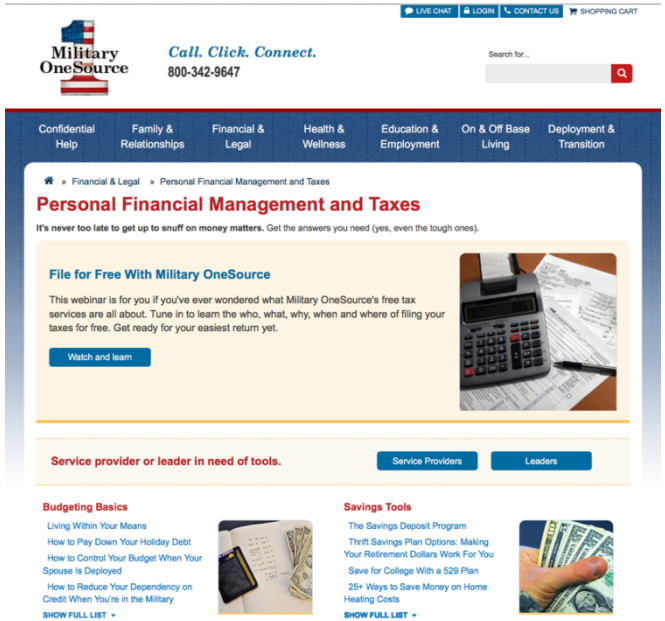
PODCAST
Financially Ready, Mission Steady
EXTERNAL LINK
USA4 Military Families
EXTERNAL LINK
Military Consumer: Your First Line of Defense
EXTERNAL LINK
Consumer Financial Protection Bureau
ARTICLE
How to Access Financial Counseling Through Military OneSource

Access

- How do I access financial tools, materials and counseling?

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Personal Financial Management and Taxes
It's never too late to get up to snuff on money matters. Get the answers you need (yes, even the tough ones).
File for Free With Military OneSource
This webinar is for you if you've ever wondered what Military OneSource's free tax services are all about. Tune in to learn the who, what, why, when and where of filing your taxes for free. Get ready for your easiest return yet.
Watch and learn
Service provider or leader in need of tools.
Service Providers
Leaders
Budgeting Basics
Living Within Your Means
How to Pay Down Your Holiday Debt
How to Control Your Budget When Your Spouse Is Deployed
How to Reduce Your Dependency on Credit When You're in the Military
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Savings Tools
The Savings Deposit Program
Thrift Savings Plan Options: Making Your Retirement Dollars Work For You
Save for College With a 529 Plan
25+ Ways to Save Money on Home Heating Costs
SHOW FULL LIST